

## Director of Finance & Administration

### About the PA IOLTA Board

The Pennsylvania Interest on Lawyer Trust Accounts Board (IOLTA Board) is a non-profit organization operating as an instrumentality of the Supreme Court of Pennsylvania. The IOLTA Board's mission is to support the delivery of free civil legal aid to low-income Pennsylvanians. It fulfills its mission by making grants to civil legal aid organizations and law school clinical and internship programs. Various revenue streams administered by the IOLTA Board finance the grants. In the current fiscal year ending June 30, 2025, grants total nearly \$39 million. For more information, visit [www.paiolta.org](http://www.paiolta.org). Our [annual reports](#) offer a summary of our work.

IOLTA Board employees are highly competent, dedicated, motivated, driven, and hard working. IOLTA Board employees are bound by the [UJS Code of Conduct](#).

### Job Description

The Director of Finance & Administration plays a pivotal role in the organization by managing all aspects of the finance department and ensuring seamless operations. The importance of this role is underscored by the impending retirement of the current Director of Finance & Administration who has dedicated 15 years to the IOLTA Board. This transition marks a significant moment for the organization, emphasizing the need for a capable and experienced individual to uphold the high standards and smooth functioning established over the past 15 years.

The duties and responsibilities of the position are performed with a large degree of independence.

Significant responsibilities of the Director of Finance & Administration include:

- Works closely with 150+ financial institutions to receive monthly and quarterly interest income earned on more than 15,000 attorney trust accounts.
- Maintains all accounting and financial records.
- Records all cash receipts and cash disbursements.
- Processes accounts receivable and accounts payable; files supporting documentation.
- Reconciles four operating and two investment accounts.
- Maintains and reconciles 120+ general ledger accounts.
- Prepares monthly financial statements, revenue schedules and other financial reports.
- Prepares annual administrative budget with the executive director.
- Presents financial statements and the annual administrative budget to the IOLTA Board.
- Processes semi-monthly payroll for six employees via Paychex; records payroll and payroll taxes in accounting software; maintains staff accrued leave balances; coordinates distribution of year-end W-2's and 1099's.
- Manages attorney trust account information and related data in the information management system.

- Reviews investment reports and works closely with the IOLTA Board's investment advisor to administer the investments in accordance with the IPS.
- Supplies accurate fiscal year-end information to external auditors and assists during the annual audit of the financial statements; audit fieldwork takes place in October; aids auditors in preparation and filing of Forms 990 and 5500; files annual PA BCO-10.
- Works closely with the Pennsylvania Legal Aid Network to obtain audited financial information from their network of programs.
- Prepares reports and materials for the Administrative Office of Pennsylvania Courts.
- Responsible for all HR-related matters; coordinates health insurance plans and other staff benefits.
- Attends, plans, and coordinates all aspects of the quarterly IOLTA Board meetings, including hotel accommodations, dinner reservations, meeting locations, on-site meeting logistics, catering, etc.
- Provides mentoring, guidance, and direct supervision of the Administrative Assistant.
- Manages office administration including fixed asset acquisitions, copier and other maintenance contracts, shredding, suite-related issues, etc.
- Performs special financial analysis and projects as needed.
- Maintains seven business insurance policies.
- Updates and reviews financial policies and procedures.
- Oversees finance related RFPs.

### Desired Capabilities

The desired candidate will demonstrate a high level of proficiency in accounting, budgeting, payroll, human resources, office administration, and meeting planning. Strong communication skills are necessary for preparing and presenting financial reports to the IOLTA Board. The successful candidate will be detail-oriented, organized, and capable of managing multiple projects while prioritizing tasks effectively.

### Education and Experience

This position requires a bachelor's degree in accounting, finance, or a related field; a Certified Public Account (CPA) is preferred. Progressive experience in nonprofit or government finance and accounting, and experience in a supervisory role is required. Proficient computer skills, especially in Microsoft Word and Excel. Knowledge of Sage 50 Accounting a plus.

Overnight travel is required twice per year to attend out of town board meetings.

Starting Salary depending on experience and education is \$100,000 – \$119,000 annually. This position is an exempt position. A typical work week is Monday – Friday, 8 am – 4 pm. All new employees are required to work on-site during the 90-day probationary period. The office is located in the Pennsylvania Judicial Center in downtown Harrisburg. After the probationary period, requests for hybrid/remote work are decided by the Executive Director on a case-by-case basis.

Benefits Include

Health, dental, and vision insurance for self and dependents

Short- and long-term disability

Life insurance

403(b) retirement plan

Annual, sick, personal and volunteer leave

Paid parking

Apply

Interested candidates should send a resume to Ali Weiand at [aweiand@susangconsulting.com](mailto:aweiand@susangconsulting.com) by January 31, 2025.